University of Tennessee easyPurchase™ Access to Order Summary Screen



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# Getting Started

## Activating Order Summary at the Entity Level

1. **ESM Solutions Support** can activate **Order Summary** for an entity under **ESM Admin> Entity Functionality** and checking **Order Summary** box and clicking **Update**.



## Activating Order Summary at the User Level

1. **ESM Solutions Support** can activate **Order Summary** for a user under **ESM Admin > Administer Entities/Suppliers**, then enter the entity name and click **Go**.
2. **Select Function > General Settings > Add/Edit Users** and search for a user to get to the screen below.

1. Under **Menu Options,** check the box for **Order Summary** and click **Update**.

*Note: All existing* ***Admin*** *users for the entity will now have* ***Order Summary*** *enabled.*

# Using Order Summary

## Accessing Order Summary

1. A user may access **Order Summary** for an entity under **Menu> Order Summary** as shown below.

## Search Criteria

1. The search screen allows the user to use any combination of the following fields:
	* Purchase Order #
	* Create Date (start/end range)



* + Fiscal Date (start/end range)
	+ Transaction Number
	+ Chart of Accounts
	+ GL Account Code
	+ Location (Ship To and/or Bill To)
	+ Total Value ( =, > , >= , < , <= )
	+ Supplier
	+ Requestor
	+ Approver/Manager
	+ Status
	+ System Note

## Running an Order Summary to the Screen

1. Enter the search criteria and click **Search**.



1. The **Order Summary Results** will be displayed to the screen.

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## Exporting an Order Summary

1. Click on **Export** button to have the **Order Summary Results** in an excel.csv format sent via email.

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# Order Summary for New Users

## Adding for New or Existing Users

1. An Administrator can add **Order Summary** for new users by going to **Menu > Admin > Select Function > General Settings > Add/Edit Users** as shown below.
2. Check the box for **Order Summary** and click **Update**